

2023 Executive Roundtable

May 12, 2023 | 10a – 2:30p (EST)



Indiana United Ways

WELCOME NEW EXECUTIVES!

QUICK ICEBREAKER

MEETING AGENDA

- Updates & Sneak Peeks from IUW
- United Way of Northern New Jersey – ALICE Report
- Ted Talks:
 - Laura Jensen,
United Way of St. Joseph Co.
 - Adam O’Doherty,
United Way of Northwest IN



IUW UPDATES & SNEAK PEEKS

JUNE		
2nd	Impact, Fundraising & Marketing Staff Combined Cohort Call 10a - 11a	Topics: Developing Impact Product Donors Will Invest In; Selling Impact Product Concepts
16th	Campaign Results Reviews, Strategy & Goal Setting for '23	<u>Office Hours with Michael Budd</u> Small group and limited 1:1 consultations on Campaign results and planning for 2023 season. These sessions will be most helpful for new Executives, new fundraisers, or Fund/Resource Development Committee Chairs HOLD YOUR SPOT NOW
23rd		
29th	Small Cities Forum 11:00a - 3:30p	Topics: tbd

← IMPACT & FUNDRAISERS

July		
7th	New Exec Camp, Session 1 12:00p - 4:30p	Topics: Assessing & Growing Impact; Workplace Campaign Prep; Troubleshooting
Board Governance & Development Month 🔗 Online: Live (10a - 10:30a) and On-Demand Mini-Sessions • Registration Opens March		
7th	Claiming Your Leadership	Roles and Responsibilities of the Board Chair
14th	Governance Guidance	Basic Governance and Nonprofit roles/responsibilities orientation for new local UW Board Members
21st	Fundraising Is a Team Sport	Everyone on the Board has a different role to play according to their skills. Learn all the ways Boards act as fundraisers; get tips to start fundraising now
28th	Always Ready: No More Panicked Succession Planning	This practical sustainability session will help Boards think about transition plans in advance of needing them

← NEW EXECS

← BOARDS

➔ Boards interested in an individual session, special consultation, retreat, or other organizational development assistance, including succession and transition planning, should contact IUW to schedule.

AUGUST		
10th	New Executive Onboarding Camp, Session 2 1p - 4:00p	Topics: tbd
10th	(All) Executives Dinner & Fireside Chat	Relaxed, casual networking, peer sharing, and teambuilding - location TBD REGISTER NOW
11th	Executive Roundtable 3 10a - 2:30p	Topics: tbd - under MEC development

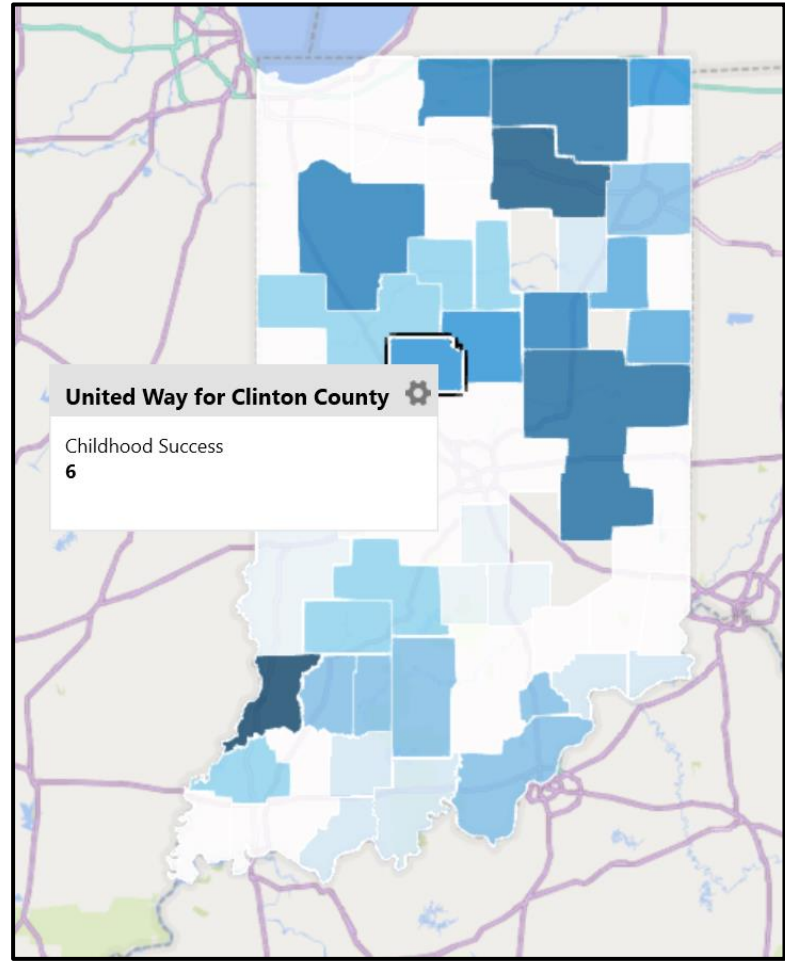
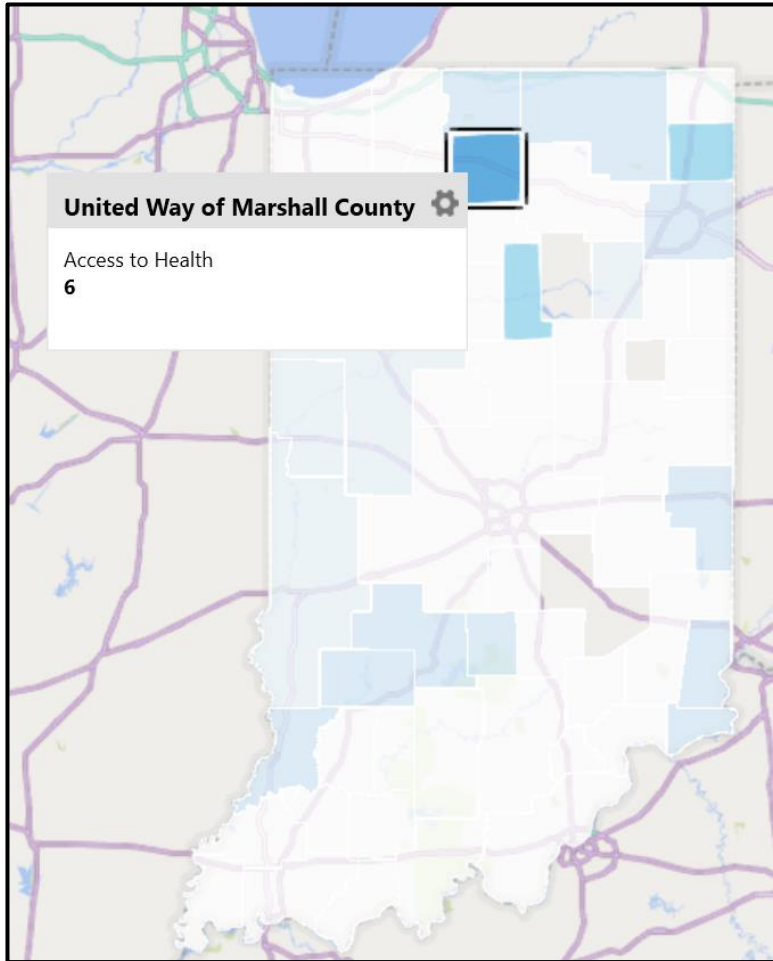
← EXEC ROUNDTABLE

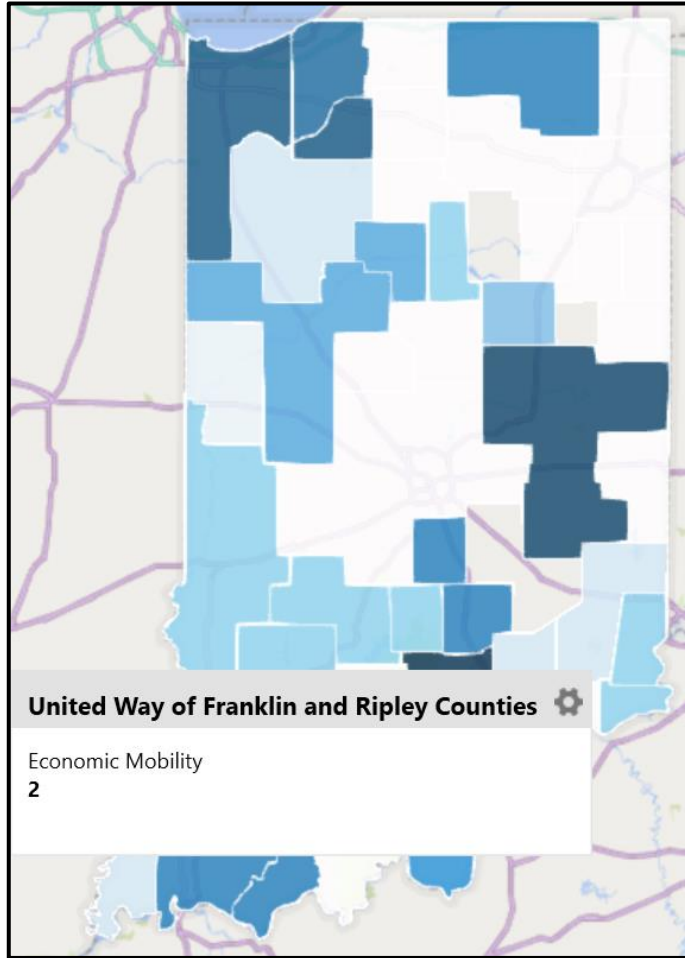
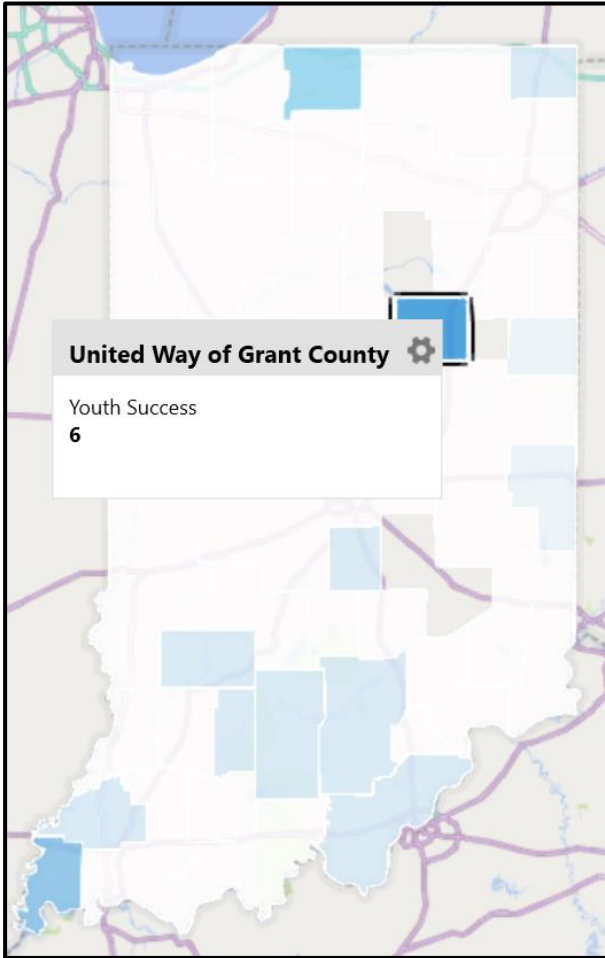
Mark Your Calendars – Share Dates with Board and Staff



YOUR COMBINED IMPACT!

**Introducing the
Impact Heat Map**





Future Goals:

Filter view by United Way(s)

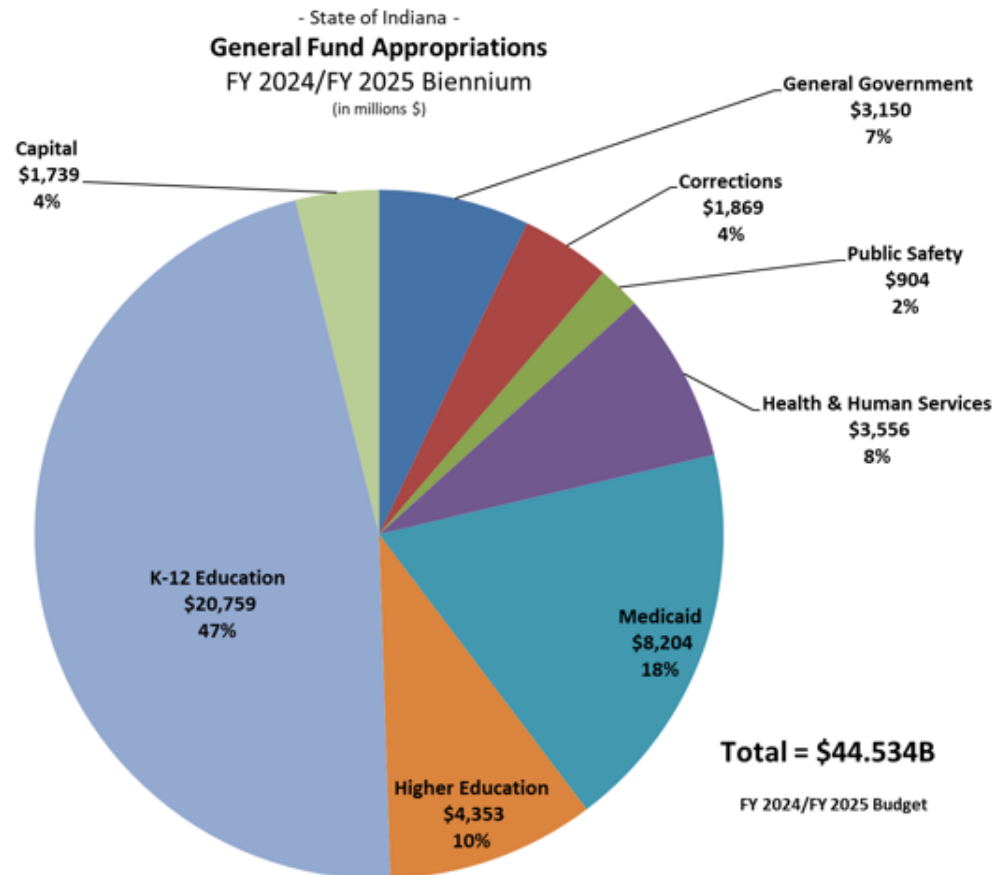
✓ View **quantity** of measures tracked ~~or list~~ of specific
measures

View **data** collected per measure

Ongoing incorporation of **additional GRF** measures

2023 was a “Long Session”

- In odd-numbered years, the IGA has a longer session than even-numbered years due to the Biennial Budget
- This year the legislature passed a \$44.5 billion Biennial Budget which will cover July 1, 2023 – June 30, 2025
- Overall, 252 bills were passed, roughly 22% of the 1162 filed bills



PUBLIC POLICY UPDATES

HEA 1001 – THE BUDGET

	FY 24	FY 25
Pre-K Education	\$22,058,017	\$27,436,887
Early Childhood Learning	\$34,695,097	\$40,073,967
Imagination Library	\$2,000,000	\$4,000,000
Mental Health Programs	\$50,000,000	\$50,000,000



Public Policy Updates

OTHER BILLS OF INTEREST

- OMWPK
 - Eligibility increase from 127% FPL to 150% FPL
 - No longer a pilot program
- Increase TANF eligibility amount from current 16% FPL up to 50% FPL over the next 2 years – benefits amounts are increased as well
- K-12 textbooks will be provided at no cost to students
- Students will automatically be enrolled in the 21st Century Scholars program
- Owners/operators of childcare facilities or preschools will be required to test drinking water for lead contamination before January 1, 2025



PUBLIC POLICY UPDATES

| *OTHER BILLS OF INTEREST*

Additional Mental Health Supports

- \$10 million for grants to support mental health services for incarcerated individuals
- \$1 million for child behavioral health services each year
- \$1 million for veteran suicide prevention each year

New Employer Child Care Expenditure tax credit

- Small – mid-size businesses (under 100 employees)
- Can be claimed for acquisition, construction, rehabilitation, or expansion of property used as part of a childcare facility

BILLS THAT DID NOT PASS



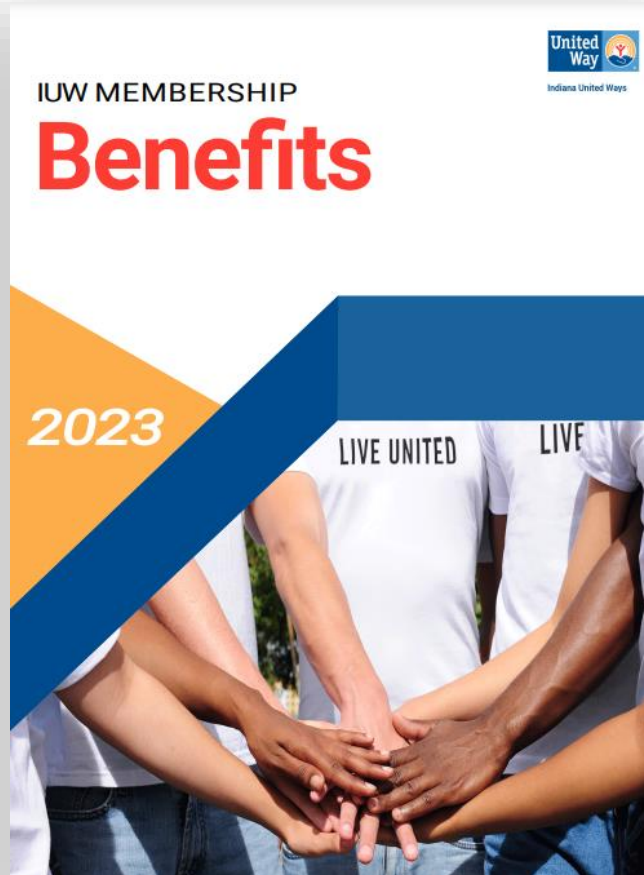
- HB 1075 – Attorney General’s NPO oversight bill
- HB 1547 – Would have eliminated the state’s current “step-rate” on loans and replace it with a 36% interest rate cap (plus fees) across the board



COMING

SOON

What Benefits Are You Using Most Right Now?



What to Expect from Today's ALICE Presentation

A person is seen from behind, holding a bright yellow umbrella. They are standing on a wooden pier or walkway overlooking a body of water. The sky is overcast and grey, with rain falling in visible streaks. The overall mood is somber and reflective.

[READ THE STATE REPORT](#)

ALICE in the Crosscurrents

2023 Report Now Available

The image features the TED logo, which consists of the word "TED" in a bold, white, sans-serif font. The letters are centered within a large, solid red circle. The background of the entire image is split: the left side is black, and the right side is a solid blue color.

TED

*Laura
Jensen*

*Partnership
Power*



*Adam
O'Doherty*

*Corporate
Relationship
Building*

What?



**What Mattered to
You Today?**

So What?



**What Is It
Significant for
You?**

Now What?



**What Are Your
Next Steps?**

UNITED WE FIGHT.
UNITED WE WIN.

LIVE UNITED®

THANK YOU!

We appreciate this time to learn from and share with you!

New Execs: See You July 7th - Assessing & Growing Impact;
Troubleshooting Workplace Campaign

All: August 11th Executive Roundtable